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ABSTRACT

Learner Verification and Revision (LVR) Process of Instructional Materials is an ongoing effort for the improvement of instructional materials based on systematic feedback from learners who have used the materials. This evaluation gives publishers a method of identifying instructional strengths and weaknesses of a product and provides an opportunity to revise that product. LVR identifies trouble spots or the absence of them, since the only people to engage in the selection are those involved in the product. Instructional materials require actual use in the classroom to determine their effectiveness. Reporting and assessing LVR activities are carried out according to a flexible format. The format includes (a) descriptive information on the product, (b) instructional design, (c) intended learner outcomes to be investigated, (d) conditions of use of product, (e) techniques for gathering feedback, (f) description of learners used in LVR process, (g) analysis of findings, (h) specific improvements made, (i) background and future of product. Three appendixes and a review of Task Force reactions are included. (DS)

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PILOT GUIDELINES

FOR IMPROVING INSTRUCTIONAL MATERIALS

THROUGH THE PROCESS OF

LEARNER VERIFICATION AND REVISION

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EDUCATION & WELFARE
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EPIE Institute, 463 West Street, New York, New York 10014 [212–675-1163]

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PREFACE

As a journalist put it recently, "Not being in favor of using the process of learner verification and revision to improve instructional materials is like not being in favor of God and motherhood; the problem is how it ought to be done."

The following pages contain the efforts of a Task Force of 36 persons who have invested a considerable amount of their time and expertise since last December to the task of helping those who are serious about utilizing the process of LVR to do so during the year ahead. The Pilot LVR Guidelines that resulted from the work of this Task Force are, like instructional materials themselves, subject to improvement. And also like instructional materials themselves, they are not "the only way" to improve student learning. Indeed, these Guidelines will be improved through feedback from "pilot" users. In fact, they are scheduled for revision by members of the Task Force after the Guidelines – or adaptations of them – have been applied by educators and educational materials companies for a year or so.

Because virtually all those who contributed to the work of the Task Force have agreed to serve once again – in reviewing and revising in order to improve these Guidelines – the usual expression of "thanks for a job well done" is, in this instance, more appropriately phrased as "thanks for a job well begun." Therefore, we at EPIE Institute express this more appropriate sentiment to the students (particularly the students, since we all work for them); teachers; administrators; local, state, and national officials; school board members; educational researchers; and representatives of the educational materials industry who have contributed thus far to the work of the National LVR Task Force. We thank you for your continued commitment and we look forward to the continuation of this important work.

P. Kenneth Komoski
Executive Director, EPIE Institute
6 June 1975

INTRODUCTION

For some years now, instructional materials developers have advocated and employed "formative evaluation" procedures as a means of improving the instructional effectiveness of products prior to their entering the commercial market. These procedures can now be recognized as important early steps toward the broader concept of learner verification and revision of instructional materials. The word-cluster, "learner verification and revision," was first used to describe the process of continual product improvement on the basis of feedback from learners in testimony before a subcommittee of the House of Representatives in 1971: " In addition to these new departures, the [instructional materials] developers also took a new approach to the development of their materials: they thoroughly evaluated the effectiveness of their materials on a group of learners and revised them accordingly, before they were released for commercial distribution. This process of learner verification and revision . . . " [More extensive excerpts from this Congressional testimony appear in Section A of the Appendix.]

The following year, the legislature of a large state enacted a law requiring publishers submitting instructional materials for adoption to "develop plans to improve the quality and reliability of instructional materials through learner verification." Later, another influential state made it a legal requirement for publishers to "provide written proof of the use of the learner verification and revision process." [The complete relevant portions of the statutes appear in Section B of the Appendix.] A leading city then announced that it would pilot LVR requirements for a year, a leading state education department announced that it wanted "written evidence [of] . . . how the publisher (authors) used the results of the field trial or pilot test in completing the book," and it became known that other states and local education agencies were interested in, even if confused by, the LVR Process.

Such was the momentum that by the fall of 1974, *Education U.S.A.* warned that the LVR Process "could cause chaos." Reporting fears expressed by members of an education industry association, the newsletter stated that "only a handful of people have any idea what learner verification is and the rest are hopelessly confused and misinformed. . . . If some understanding and agreement is [sic] not brought to this subject, the industry could face 50 different guidelines – one for each state."

In an attempt to bring "understanding and agreement . . . to this subject," EPIE Institute organized and sponsored a National LVR Task Force charged with developing guidelines for publishers and educators. The Task Force is composed of 36 "official" and "unofficial" participants and 12 observers. The composition of the Task Force represents just about every relevant educational, commercial, and lay interest: program developers from the educational materials industry together with educational researchers from university centers; students, teachers, and people from citizens' and other interested groups; sales people from the educational materials industry together with people from the state and local level who are responsible for selecting instructional materials.

The paper that follows – with its wordy titles, "Orientation Toward a Definition of the LVR Process" and "Guidelines for Reporting and Assessing LVR Activities" – is the result of four Task Force meetings over a three-month period. Precisely put, the paper that follows is the result of EPIE Institute's perceptions of the Task Force's collective position.

It must be understood that the guidelines are not intended to be viewed as model legislation. They are not even intended to be viewed as model regulations or policies. In fact, they are not even – nor may they ever be – in final form. They are best viewed, as one Task Force participant has said, as "the beginning of a series of successive approximations toward an ideal – as yet undefined – that points toward the continual improvement of the tools of learning."

In short, the following "Orientation Toward a Definition of the LVR Process" and "Guidelines for Reporting and Assessing LVR Activities" are offered in the public interest, as guidance for any interested party to accept, to adapt, or to reject. The Task Force – which, it is expected, will reconvene after a year or so of experience testing the guidelines – has no authority save the reasonableness, credibility, and usefulness of its efforts.

Kenneth E. Baranski
Consultant to EPIE Institute and
Secretariat to the Task Force

ORIENTATION TOWARD A DEFINITION OF THE LVR PROCESS

The LVR Process is a learner-based process for improving instructional materials.

Stated in a more definitional manner: The LVR Process of Instructional Materials is an ongoing effort at the improvement of instructional materials based on systematic feedback from – as the primary source – learners who have used the materials.

In other words, with the LVR Process, publishers decide whether to revise their materials – and specifically *how* to revise them, if they are to be revised – on the basis of data from learners. These data can be collected *from various people:* directly from the learners themselves; from teachers who report their perceptions of learners in their classrooms; from staff members of publishing companies; and from other observers of learners using the materials. Also, these data can be collected *in various ways:* through classroom observations; through interviews with learners, individually and collectively; through interviews with teachers; through structured questionnaires filled in by learners and teachers; through criterion-referenced tests; and so on. And, finally, these data are assessed by publishers and, perhaps, by teachers and others.

It is necessary to stress, because there is evidence of misunderstanding on this point, that *the LVR Process does not guarantee or certify that instructional materials will bring about explicitly predictable results with learners.* In fact, responsible publishers, notwithstanding any field-testing they may have done, do not make such guarantees about their materials, nor, indeed, do responsible buyers expect such guarantees. It is obvious that there are so many variables operating in the learning process that such guarantees cannot honestly be made and, for this reason, ought not be made. [At this point, some amplification, which can be found in Section C of the Appendix, may be helpful.]

Lest there be another sort of misunderstanding about the specific role of the LVR Process in relation to the overall publishing process, it should be understood that publishers, in developing and revising their instructional materials, engage in a number of activities aimed at insuring product quality. For example, accuracy and currency of subject matter are a primary consideration during the development and revision of certain instructional materials; publishers can turn to content specialists in order to insure accuracy and currency of such subject matter. Similarly, when it comes to fair and full treatment of important social issues, publishers can turn to appropriate experts and groups for review and reaction. But when the issues are how well learners understand the subject matter and other learnings dealt with in specific instructional materials, and what particular aspects of those materials might be revised in order to improve the understanding of learners, then publishers must turn to data gathered from learners. Having gathered such data, publishers will be able to identify instructional strengths and weaknesses of a product and to revise, if necessary, specific aspects of a product in order to improve its instructional effectiveness. This learner-based approach to instructional improvement is the specific role assigned to the LVR Process.

It may seem reasonable to assert that all materials marketed for use by learners should be subject to the LVR Process. But because not all materials used by learners have been explicitly designed for the purpose of instruction, there is a need to clarify which materials are candidates for the LVR Process and which are not. First of all, what are *instructional*

materials? One incomplete definition can be tentatively advanced: Instructional materials are those materials which have been explicitly designed to enable learners to achieve specifically stated, or otherwise clearly apparent, instructional intents. An algebra textbook, a filmstrip on the metric system, and television lessons on art history are all obviously instructional materials under this definition and, thus, clearly candidates for LVR. A work like *Macbeth* would not be a likely candidate for the LVR Process, because it contains no explicitly apparent instructional intent. Although *Macbeth* is used in classrooms to achieve certain instructional intents, those intents are brought to the play by the teacher. Yet, a publisher conceivably might want to investigate the suitability of the study of *Macbeth* in a certain grade or to gather data, for example, on affective effects of the play on learners; while revision of Shakespeare's text obviously would not follow, what might be revised in the light of such feedback are the supporting instructional materials: reading guides and manuals used by learners and teachers in studying the play. Also, a modernized or otherwise rewritten version of *Macbeth,* which would constitute a *Macbeth* that is no longer Shakespeare's, could become a candidate for the LVR Process. It seems safe to aver that if a publisher describes materials as *instructional* when they're offered for sale – or if selectors view them as instructional materials – those materials should be considered candidates for the LVR Process.

Therefore, from the perspective of the LVR Process, it is helpful to view the universe of instructional materials as a continuum. All materials used in schools can be placed at some point on this continuum, with respect to the degree of their instructional design and their instructional intents. Some programs, like basal reading programs, have very obvious designs and very clear intents. Others, like the actual text of *Macbeth* standing by itself or a series of slides of great paintings by themselves, may have no obvious instructional design or no clearly apparent instructional intents. Before submitting a LVR Report for a product, a publisher should anticipate the expectation of "substantial LVR," as it were, for products with maximum instructional design and intents. For products of little or no built-in instructional design or apparent instructional intents, a publisher may wish to substitute for substantial LVR a documented statement supporting the notion that the LVR Process does not reasonably apply to those products. Such a supporting statement will perform two important functions: (1) It will enable the publisher to make undeniably clear the nature and intended role of the product, and (2) it will enable the purchaser to assess better the potential uses and instructional expectations of the product.

In summation: As educational materials increase in structure and in the explicitness of their instructional intents, LVR activities increase in importance and in appropriateness; as educational materials have less structure and are less clear in their intents, LVR activities are less important and may even be replaced by a well argued statement that the LVR Process is either impossible or inappropriate with a specific product.

The issues of the selection of learners for the LVR Process and who conducts LVR activities are too important to be ignored at this point, particularly because they can be briefly dealt with. As President Lincoln reportedly instructed his tailor to make his trousers long enough to reach the ground, so publishers should select enough learners for the LVR Process to do the job. A less flippant explanation is given in the following "Guidelines for Reporting and Assessing LVR Activities," in the section treating the description of learners used in the LVR Process. With respect to who conducts LVR activities, the issue should not be an issue because it should be evident that only the publisher should conduct LVR activities. The notion of an outside agency's conducting LVR for a publisher reveals specious reasoning. LVR is not a certification process which aims for some sort of seal of approval from an independent testing agency; LVR is a process for identifying trouble spots (or the absence

of them) and the only appropriate people to engage in it are the people intimately involved in developing the product.

It should not be inferred from anything said above that LVR is in the exclusive domain of publishers. While only publishers can initiate the decision to carry out to completion the LVR Process, the responsibility for LVR certainly does not apply only to publishers. Schools share this responsibility. Whereas publishers accept the responsibility for product development and revision and for the specific techniques to be used in gathering learner feedback, schools accept the responsibility for arranging for the participation of learners and teachers in the LVR Process. If a school expects that a publisher has put materials through the LVR Process, that very same school must be ready to make it possible for the publisher "to LVR" the materials, which includes the working out of logistics and necessary safeguards for LVR activities. Furthermore, schools themselves can take the initiative (as some are now doing) in devising data-gathering techniques, in using the techniques to gather data from learners, and in reporting the data, perhaps with their analyses, to publishers.

In other words, any educational unit – whether an individual classroom, a single school, a school district, or a state – that makes LVR a requirement of publishers must itself make a commitment to LVR. And this commitment, in addition to agreeing to cooperate with publishers, includes taking or delegating the responsibility for assessing LVR Reports from publishers.

The "Guidelines for Reporting and Assessing LVR Activities," which follow, should not be viewed by purchasers as a panacea for the continued improvement of the learning effectiveness of instructional materials. Schools must keep in mind that effective instructional materials require effective use in the classroom. The LVR Process is but one activity, albeit an important one, directed toward the continued improvement of instruction through the development, selection, and use of increasingly effective instructional materials for learners.

GUIDELINES FOR REPORTING AND ASSESSING LVR ACTIVITIES

The purpose of a report on LVR activities is to enable the publisher of instructional materials to provide educators with evidence that a particular product has been – or soon will be – put through the LVR Process as part of a continuing effort to improve its effectiveness with learners. Although a publisher can fashion various LVR models and yet conform to the basic objective of the LVR Process, certain elements in every model are essential. These essential elements, which taken together operationally define the process, are asterisked below and should be addressed in every LVR Report. What is offered below, then, is not an inviolable *form* that all publishers must use or that purchasers demand be used; rather, it should be viewed as a flexible *format* which constitutes a set of guidelines to the publisher for preparing a LVR Report and to educators for reading and assessing such a report.

Descriptive Information on Product

[The publisher should provide "catalog" information on the product, such as title, authors, copyright, medium or media involved, kinds of supplementary components, and so on. The "product" is any kind of material offered for adoption consideration as an instructional material. It should be described as it normally is when submitted to an adoption/selection committee, that is, a six-year textbook series, for example, or a multicomponent (and perhaps multimedia) "system" being considered as one product.]

* Instructional Design

[The "instructional design" of a curriculum product can be thought of as the overall learning plan for the product. The design should be described and the underlying rationale for that design should be stated.

[It is to be expected that a product with integrity of design – a product whose instructional elements are well integrated – will easily be put through a well designed LVR effort. Conversely, a product without an apparent instructional design cannot easily, if at all, be subjected to a cycle of the LVR Process.]

* Intended Learner Outcomes To Be Investigated

[This should be a statement of what the publisher intends the product to accomplish when used with integrity with learners. If such a statement appears in the product itself or in accompanying promotional pieces, a reference may be made to where it can be found.

[It may be that at a particular time the publisher wants to investigate only certain outcomes within the larger scope of intended learner outcomes, in which case this intention should be stated. It may be also that a publisher of a six-year textbook series (with various attendant materials), for example, may investigate selected outcomes of an exemplary portion of the entire program and use the resultant data to guide revisions of other portions of the program; if so, this should be made clear.]

*** Conditions of Use of Product**

[The publisher should specify the overall instructional setting intended for the product. Basically, this includes a description of what is termed the "target population" and a noting of the kinds and extent of "teacher preparation." The target population is simply the kinds of learners the product is intended for. Characteristics which may or may not be relevant are: grades students are assigned to because of their maturity, not achievement, levels; actual grade levels, particularly with respect to reading achievement; ethnic backgrounds; family and community socioeconomic level; and so on. Teacher preparation involves such teacher-related matters as supplementary teacher materials, inservice teacher education, and classroom preparation.]

*** Techniques for Gathering Feedback**

[Techniques for gathering feedback from learners may include, but are not limited to, individual learner and classroom observations, interviews, questionnaires, and criterion-referenced tests. These techniques should be designed to gather data both on direct-learning effects and on affective reactions of learners.

[Techniques used in large-scale, field-test validation attempts are not to be confused with techniques used for gathering learner feedback for the LVR Process. Similarly, techniques used to elicit product testimonials for promotional purposes ("I like this textbook very much and so does my class") – as opposed to reactions gathered as a result of questionnaires or interviews, which may be used in promotion pieces – are inappropriate for the LVR Process.]

*** Description of Learners Used in LVR Process**

[The selection of learners for the LVR Process is not to be confused with a scientifically drawn "national sample" of students required for the validation of standardized tests and for attempts at validation of other materials. Such a "sample" will perforce involve thousands of students. A LVR selection – because the aim of LVR is to identify trouble spots in order to improve materials, not to prove how well materials work – may comprise a handful of learners from the target population or a handful of classes. In fact, in some instances – and the publisher should justify the use of this procedure – a few students might be taken through the LVR Process in the offices of the publisher, unless there are certain conditions of a classroom setting which are necessary and which cannot be approximated in the offices.

[The factor of conditions of a classroom setting suggests the relevant factor of two interrelated bases of product performance subject to LVR improvements, which can be conveniently distinguished as "textual" and "contextual" characteristics. Textual characteristics are characteristics of the materials themselves which learners use (goals and objectives; scope and sequence; provisions for evaluation; and so on); contextual characteristics are characteristics of the setting the materials are used in (the presence or absence of teacher's editions or manuals, or certain other supplementary resources; the teaching/management plan; and so on). Students might be taken to the publisher's office if textual improvements are being sought by the publisher, but they probably should not be if contextual improvements are being sought.

[In summation, the publisher should report: (1) the procedure for selecting learners, (2) the relevant characteristics of these learners and (3) the rationale for this step.

[Those charged with the responsibility of assessing LVR Reports are urged not to get involved in a "numbers game" – that is, ranking publishers according to the number of learners used in a publisher's LVR activity – because such a ranking is at best unproductive, at worst grossly misleading.]

*** Analysis of Findings**

[After assessing the extent to which a product is and is not as effective as it might be with a selection of learners and after gathering data, the publisher analyzes the data. It is desirable that the publisher make known the analysis of the findings in a LVR Report. It may be, however, that the publisher would consider such information to be proprietary, because revealing it could give competing publishers an advantage; in such cases, the publisher may explain the reasons for keeping the findings and the analysis of the findings confidential, and, with this condition accepted by an adoption committee, release the information only on request. It may be also that the publisher states in a LVR Report a justification for not releasing any information whatsoever on findings, in which case the publisher should also describe – with as much specificity as prudence allows – the kinds of trouble spots identified both within the materials used by learners and in the overall teaching/management plan.

[Here too, those charged with the responsibility for assessing LVR Reports should understand the competitive nature of educational publishing, and they should be influenced by the reasonableness of the report that the publisher does provide.]

*** Specific Improvements Made**

[The analysis of findings enables the publisher to identify exactly where specific changes should be made, both textual and contextual changes. Improvements can involve aspects relating to learner materials (textual), such as verbal or visual communications, manageability, appeal to learners, goals and objectives, scope and sequence, various kinds of bias, motivational elements, directions to learners, activities for learners, and the congruence of product elements. Improvements can relate to teaching aspects (contextual), such as classroom preparation, record-keeping provisions, teaching design, and inservice education.

[As an ideal component of a LVR Report, the very in-house record of changes compiled by the publisher – including, perhaps, an annotated version of the product used with the selection of learners – might be made available by the publisher, on special request, for examination by an adoption committee.

[Once again, however, the proprietary nature of changes made may constrain a publisher, in which case the reasonableness of what the publisher does report is itself a factor in assessment. Here, though, even more is involved than what was noted above. A publisher may fear that citing a large number of changes might be an adverse reflection on the product and the publisher. Then, too, an unscrupulous publisher might be tempted to develop an intentionally shoddy product to demonstrate, through the LVR Process, a substantial quantity of improvements.

[It is, therefore, up to those assessing LVR Reports to be conscious of realities constraining – and of apprehensions cautioning – a responsible publisher, and to be mindful of trickery tempting an irresponsible publisher.]

Background and Future of Product

[The publisher should briefly describe any part of the product's history that might be relevant and helpful to a full understanding of the publisher's LVR efforts with the product. Also, the publisher may want to describe plans for future LVR efforts with the product, although the publisher would want to consider that a premature revelation of plans might give competitors an advantage.]

Person to Contact for Clarification, More Detail, or Updated Information:

Name _____ Position _____

Company _____ Division _____

Address _____

Telephone _____

APPENDIX: Section A

Hearings before the Select Subcommittee on Education of the Committee on Education and Labor; House of Representatives; Ninety-Second Congress; First Session on H.R. 33, H.R. 3606, and Other Related Bills To Establish a National Institute of Education, and for Other Purposes; 1971:

"The materials I [P. Kenneth Komoski, Executive Director, EPIE Institute] refer to are the textbooks, films, tapes, kits, and complex multimedia systems that are the concrete artifacts of learning in our schools. These materials are the tools of learning, constantly used and depended upon by teachers and students alike. Indeed, one can conceive of a school without walls, or even an educational system without schools, but a modern educational system without tools – in the form of a variety of educational materials – is inconceivable. Today's education requires that these tools be better, sharper, more dependable – in other words, more effective – than ever before. . . .

"In addition to these new departures, the developers also took a new approach to the development of their materials: they thoroughly evaluated the effectiveness of their materials on a group of learners and revised them accordingly, before they were released for commercial distribution. This process of learner verification and revision emerged about a decade ago, primarily in the development of programmed instruction materials. Since that time the process has been adopted by many Federally-funded product development programs, but by very few commercial producers.

"One reason why commercial producers have not adopted the verification process may be that few schools look for evidence of learner-verification when selecting curriculum materials. . . . Another reason is that new materials with new approaches are harder to sell.

" . . . These terms [learner verification and revision] are simply a researcher's way of saying that the learning effectiveness of a product will be improved if it is taken through a systematic cycle of tryouts with learners followed by revisions based on the feedback. Such evaluations need not always involve large groups of learners. Through appropriate sampling a small group of 'target' students can give the product developers ample opportunity to catch errors and trouble spots and to revise accordingly. . . .

"[In] evaluating products, school selection committees must devote most of their limited time to judging a product's content and pedagogical approach. Practically no time can be given to gathering evidence of a material's learning-effectiveness. Committees assume that materials with 'good content and the right approach' will, by definition, be effective with learners. Logical as this may sound, it is not necessarily true. . . .

"Fortunately, some research exists which has examined the question of whether it is possible to infer the learning effectiveness of particular examples of instructional materials by simply examining them. This research raises serious doubts about the reliability of the practice of judging the quality of learning effectiveness without the help of learner-verification data. . . .

"Not just existing research, but common sense, makes it quite clear that at present any responsible effort to create or select materials of proven learning effectiveness must use data from learner-verification. So the problem is not that research does not answer the question directly and unambiguously – *the real problem is that the question of learning effectiveness does not seem to be of great interest to the producers and purchasers of educational materials.*"

APPENDIX: Section B

California Instructional Materials Law; Compiled by Curriculum Frameworks and Instructional Materials Selection Unit; California State Department of Education; Sacramento, 1974:

> "9234. 'Learner verification' means the continuous and thorough evaluation of instructional materials for their effectiveness with pupils.
>
> "9426. Publishers and manufacturers shall, in accordance with rules and regulations adopted by the state board, develop plans to improve the quality and reliability of instructional materials through learner verification. Governing boards shall be encouraged to permit publishers and manufacturers to have limited access to classrooms for necessary testing and observation. Publishers and manufacturers shall provide copies of test results and evaluations made as part of learner verification at the request of any governing board."

Unofficial; Chapter 233; Courses of Study and Instructional Aids; Compiled by Textbook Services Section, Division of Elementary and Secondary Education, Florida Department of Education; 07/09/74:

> "233.25 . . . Publishers and manufacturers of instructional materials or their representatives shall:
>
> " . . . (3) Submit, at a time designated in section 233.14, Florida Statutes, the following information:
>
> " . . . (b) Written proof of the use of the learner verification and revision process during prepublication development and post-publication revision of the materials in question. For purposes of this section learner verification is defined as the empirical process of data gathering and analysis by which a publisher of a curriculum material has improved the instructional effectiveness of that product before it reaches the market and then continues to gather data from learners in order to improve the quality and reliability of that material during its full market life. Failing such proof, if the publisher wishes to submit material for adoption, he must satisfy the state instructional materials selection council that he will systematically gather and utilize learner-verification data to revise the materials in question to better meet the needs of learners throughout the state. Such text revision should be interpreted as including specific revision of the materials themselves, revision of the teachers' materials and revision of the teachers' skill through retraining, it being the intent of the legislature that learner-verification and revision data shall include data gathered directly from learners and that such data may include the results of criterion-referenced and group-normed tests, direct learner comments, or information gathered from written questionnaires from individual or small group interviews, and not precluding the use of secondary data gathered from teachers, supervisors, parents, and all appropriate participants and observers of the teaching-learning process."

Unofficial; Proclamation of the State Board of Education Advertising for Bids on Textbooks; Texas; May 1975:

> "1.13 In the developmental stage of each textbook, authors should have field tested the material with teachers and students in planned field trial or pilot test. Written evidence from such testing, showing how the publisher (authors) used the results of the field trial or pilot test in completing the book, should be made available to the State Textbook Committee."

APPENDIX: Section C

There appear to be at least three arguments which militate against the use of the term, "learner verification and revision," making its handy abbreviation, "LVR," desirable.

First, there seems to be a tendency for some people to refer to "learner verification," rather than "learner verification and revision." Although the shortened version may be more comfortable to use, its usage can so mislead people that the crucial point of the LVR Process – that it is a process for *revising* materials – can be irrevocably lost.

Second, the word, "verification," apparently suggests to some people the concept of "proof." Thus, in the context of instructional materials, these people expect from the LVR Process some sort of certified proof that instructional materials will achieve certain predictable results. Here too, it is crucial to understand that the LVR Process is not intended to – and does not – produce such proof.

Third, there is evidence that some people feel "verification" and "validation" are synonymous. Traditionally in the field of education, "validation" has been used to mean the determining of achievement norms, particularly with standardized tests. Once again, it is crucial to understand that the LVR Process makes no such determination.

If these arguments dissuade people from using the term, "learner verification and revision," perhaps arguments should be advanced against the abbreviation, "LVR." A number of people have suggested that since it has been stated at the outset that "The LVR Process is a *learner-based* process for improving instructional materials," the obvious label is "L-BR," standing for "learner-based revision." When it reconvenes after a year's experience, the Task Force may be discussing "L-BR Guidelines."

TASK FORCE REACTIONS

Those attending Task Force meetings were sent "LVR Paper: Draft #5" on 21 March 1975 and were invited to select one of three options. The options and the reactions follow.

option (a) I recommend that Draft #5 of the LVR Guidelines in its present form, or with the minor emendations I have made, be distributed to all interested parties.

option (b) I am not completely satisfied with Draft #5 of the LVR Guidelines and ask that the statement of my reservations, which I'm attaching, be appended to it when it is distributed to all interested parties.

option (c) I am totally dissatisfied with Draft #5 of the LVR Guidelines and wish that my dissatisfaction, as I have expressed it in the attached statement, be appended to it when it is distributed to all interested parties.

Tracy Archibald
[high school student]
c/o Executive High School Internships Program
Wichita Public Schools
640 North Emporia Street
Wichita, Kansas 67214
selected option (a)

Robert Baker
[educational researcher]
Director of Planning and Program
SWRL Educational Research and Development
4665 Lampson Avenue
Los Alamitos, California 90720
selected option (a)

Donna E. Carrick
Research Coordinator
Marketing – Program Planning
Encyclopaedia Britannica Educational Corporation
425 North Michigan Avenue
Chicago, Illinois 60611
[For option selected, see listing for Suzanne T. Isaacs.]

Myrna Cooper
Special Representative for Educational Services
American Federation of Teachers (AFL-CIO)
260 Park Avenue South
New York, New York 10010
no response received

Sterling P. Davis
Area Coordinator, Sales Department
Guidance Associates
757 Third Avenue
New York, New York 10017

[For option selected, see listing for Suzanne T. Isaacs; also, see attachment #1.]

Terry Denny
[educational researcher]
Professor of Education
College of Education
University of Illinois
Urbana, Illinois 61801

selected option (a)

J. Emory Dykes
Administrator, Textbook Services
Florida Department of Education
Tallahassee, Florida 32304

[See attachment #2: "Guidelines for the Learner Verification and Revision Process; 1976 Adoption; State of Florida, Department of Education."]

Estelle Fuchs
Professor, Graduate Center
City University of New York, and
Professor, Hunter College
City University of New York
New York, New York 10021

selected option (a)

Edythe J. Gaines
Executive Director
Division of Educational Planning and Support
Board of Education of the City of New York
110 Livingston Street
Brooklyn, New York 11201

selected option (a)

Michael Halperin
Vice President
Q-ED Productions
2921 West Alameda Avenue
Burbank, California 91507

[For option selected, see listing for Suzanne T. Isaacs.]

Robert J. Harper II
Director, Model Legislation Project
Lawyers' Committee for Civil Rights Under Law
733 Fifteenth Street, N.W.
Washington, D.C. 20005

selected option (a)

Gary Haseloff
Chief Consultant
Division of Instructional Resources
Texas Education Agency
201 East Eleventh Street
Austin, Texas 78701

selected option (a) [See attachment #3.]

Carolyn Hawley
formerly, Coordinator, Ad Hoc Committee to Improve North Carolina's Textbook Selection Procedures
c/o Learning Institute of North Carolina
1006 Lamond Avenue
Durham, North Carolina 27601

selected option (a)

Wayne Henderson
Administrative Assistant to the Chief Deputy Superintendent
California State Department of Education
721 Capitol Mall
Sacramento, California 95814

selected option (a)

Jesse Holmes
[high school student]
c/o Urban Journalism Workshop
1709 Third Street, N.E.
Washington, D.C. 20002

selected option (a)

Suzanne T. Isaacs
Vice President
Society for Visual Education, Inc.
1345 Diversey Parkway
Chicago, Illinois 60614

option (c) selected by Board of Directors of Educational Media Producers Council [See attachment #4.]

Girvin Eaton Kirk

Executive Director
National Council for Children's Media, and
Research Consultant to Sesame Street Magazine
Children's Television Workshop
One Lincoln Plaza
New York, New York 10023

selected option (a)

Susan S. Klein

Senior Research Associate
School Practice and Service Division
Office of Dissemination and Resources
National Institute of Education
Department of Health, Education, and Welfare
Washington, D.C. 20208

selected option (b) [See attachment #5.]

Marilyn Langdon

[member, National School Boards Association]
School Board Member
Racine Unified School District #1
Racine, Wisconsin 53405

selected option (b) [See attachment #6.]

James E. LeMay

Senior Vice President, Marketing
Coronet Instructional Media
65 East South Water Street
Chicago, Illinois 60601

[For option selected, see listing for Suzanne T. Isaacs.]

Ruth Mancuso

President, State Board of Education
New Jersey State Department of Education
225 West State Street
Trenton, New Jersey 08625

selected option (a)

Carl L. Marburger

Senior Associate
National Committee for Citizens in Education
Wilde Lake Village Green
Columbia, Maryland 21044

selected option (a)

Susan M. Markle
Professor
University of Illinois at Chicago Circle
Office of Instructional Resources
Chicago, Illinois 60680

selected option (a)

Kevin McMahon
[first-year student]
University of Vermont
Burlington, Vermont 05401

selected option (a)

Thomas J. Murphy
Vice President and General Manager
School Department
Holt, Rinehart and Winston
383 Madison Avenue
New York, New York 10017

no option selected in statement on behalf of Research Committee of Association of American Publishers [See attachment #7; also, see attachment #8.]

Dianne McDonald Newkirk
[member, National Education Association]
Unit Leader and Teacher
Dogwood Elementary School
12300 Glade Drive
Reston, Virginia 22091

no response received

Chris Pipho
Associate Director
Research and Information Services
Education Commission of the States
300 Lincoln Tower
1860 Lincoln Street
Denver, Colorado 80203

selected option (b) [See attachment #9.]

Donald Senter
Director, Product Development
EDL/McGraw-Hill
1221 Sixth Avenue
New York, New York 10020

[For option selected, see listing for Suzanne T. Isaacs.]

Ned A. Simmons

Assistant Superintendent
Administration and Operation
Monroe County Board of Public Instruction
Key West, Florida 33040

[See attachment #2: "Guidelines for the Learner Verification and Revision Process; 1976 Adoption; State of Florida, Department of Education."]

Thomas L. Simpson

Research and Development Manager
Chas. A. Bennett Co., Inc.
809 West Detweiller Drive
Peoria, Illinois 1614

coined option (d) ["totally dissatisfied . . . do not want the expression of my dissatisfaction appended."]

Charles Speiker

Associate Director
Association for Supervision and Curriculum Development
1701 K Street, N.W.
Washington, D.C. 20006

selected option (a) [See attachment #10.]

Richard C. Spitzer

Manager, Government Affairs
Government Information Office
Science Research Associates, Inc.
1801 K Street, N.W.
Washington, D.C. 20006

selected option (a)

Deborah Thompson

[student, Woodrow Wilson High School, Dallas, Texas]
c/o Executive High School Assistant Program
Dallas Independent School District
Dallas Chamber of Commerce
1507 Pacific Street
Dallas, Texas 75201

selected option (a)

Edwin Thompson

[member, National School Boards Association]
School Board Member
The School Board of Polk County, Florida
District #3
Bartow, Florida 33830

selected option (c) [See attachment #11.]

Robert N. Walker
Director of Testing
Ginn and Company
191 Spring Street
Lexington, Massachusetts 02173
no option selected [See listing for Thomas J. Murphy.]

Edwin Zippe
[member, National Education Association]
Teacher, Social Studies Department
Alexis I. Dupont High School
50 Hillside Road
Greenville, Delaware 19807
selected option (a)

The following people were also present for portions of a Task Force meeting.

Brian Bunch
Vice President and Editor-in-Chief
American Book Company
450 West 33rd Street
New York, New York 10001

Joseph W. Crenshaw
Chief, Bureau of Curriculum and Personnel Development
Florida Department of Education
Tallahassee, Florida 32304

John H. Fisher
President
Guidance Associates
757 Third Avenue
New York, New York 10017

Morris Freedman
Director, Bureau of Audio-Visual Instruction
Division of Educational Planning and Support
Board of Education of the City of New York
131 Livingston Street
Brooklyn, New York 11201

Hannah N. Geffert
Model Legislation Project
Lawyers' Committee for Civil Rights Under Law
733 Fifteenth Street, N.W.
Washington, D.C. 20005

Robert M. McClure
Program Manager
Instruction and Professional Development
National Education Association
1201 16th Street, N.W.
Washington, D.C. 20036

Cameron S. Moseley
President
BCMA Associates, Inc.
52 Vanderbilt Avenue
New York, New York 10017

Daniel M. Schember
Model Legislation Project
Lawyers' Committee for Civil Rights Under Law
733 Fifteenth Street, N.W.
Washington, D.C. 20005

Wendell Shackelford
Chairman
Guidance Associates
757 Third Avenue
New York, New York 10017

Philip W. Tiemann
Head, Course Development
Office of Instructional Resources
University of Illinois at Chicago Circle
Chicago, Illinois 60680

Kathryn Troy
Manager, Product Research
School Department
Holt, Rinehart and Winston
383 Madison Avenue
New York, New York 10017

Michael W. Walsh
Coordinator, Sales and Publishing
American Technical Society
5608 Stony Island Avenue
Chicago, Illinois 60637

21 April 1975

Memorandum to: P. Kenneth Komoski
Kenneth E. Baranski
EPIE
463 West Street
New York, New York 10014

ATTACHMENT #1

1975 APR 30 AM 11:35

From: Sterling P. Davis
Guidance Associates

To your memorandum of March 31, 1975 I am responding individually. Upon careful consideration, I find none of the responses you solicit acceptable. They all lead one to believe that Draft #5 of the LVR guidelines has substance and relevance in publishing and teaching and learning... at least according to the varying approbation or disapprobation of all those who attended a National LVR Task Force meeting. You are really asking us what we thought of the dinosaur who walked proudy across the plains today, and not if we saw the dinosaur.

The dinosaur's pride I happened to miss, along with the dinosaur; I also missed the improvements in Draft #5 of the LVR guidelines. I find the whole LVR undertaking preposterous. It rears its head amidst EPIE inferences that educational publishers often do a bad job and that they have done a bad job for some time. It tampers grotesquely with the conventional notions of validity and verification in a fallacious appeal for workableness and authority. It is on the central issue of verification that the LVR doctrine falls apart. We must forsake not only scientific method but the precious Aristotelian distinction between the particular and the universal. This reason alone, I should think, dooms the LVR idea to extinction. As an appeal for authority too, it looks to educators and state legislatures to mark its efforts, while they, quite properly, look back with open minds, hoping that LVR will insure better quality teaching materials. It makes so much of feedback from the learner (in Draft #5 practically any old learner will do) that, quite incredulously, the learner dwarfs the teacher.

The wave of consumerism over educational publishing, let loose by EPIE, is as irresponsible as it is opportunistic. Among large and small publishers, I find the state of the art of making and revising educational products far ahead of the formalistic pretensions of the LVR guidelines. The marketplace's judgment is quite final.

We have so many institutions in America over which the individual has virtually no control that it seems to me important to nip in the bud the LVR concept, already well nourished in the soil of casuistry, lest it become another glob of bureaucracy with which to contend. Neither publishers, nor teachers, nor students need another rubber stamp. And in these depressed times, educational salesmen can scarce afford to go dinosaur-watching.

ATTACHMENT #2

STATE INSTRUCTIONAL MATERIALS COUNCILS

Adopted May 2, 1975

1975 MAY -8 AM 11:28

GUIDELINES FOR

THE LEARNER VERIFICATION AND REVISION PROCESS

1976 Adoption

STATE OF FLORIDA
DEPARTMENT OF EDUCATION
TALLAHASSEE, FLORIDA

RALPH D. TURLINGTON, COMMISSIONER

Position Statement and Guidelines Regarding the Learner-Verification and Revision Process of State-Adopted Instructional Materials in Florida

Florida Statutes, 233.25.- Duties, responsibilities, and requirements of publishers and manufacturers of instructional materials.- Publishers and manufacturers of instructional materials, or their representatives, shall:

(3) Submit, at a time designated in s. 233.14, the following information:

(b) Written proof of the use of the learner-verification and revision process during prepublication development and postpublication revision of the materials in question. For purposes of this section "learner-verification" is defined as the empirical process of data-gathering and analysis by which a publisher of curriculum material has improved the instructional effectiveness of that product before it reaches the market and then continues to gather data from learners in order to improve the quality and reliability of that material during its full market life. Failing such proof, if the publisher wishes to submit material for adoption, he must satisfy the state instructional materials selection council that he will systematically gather and utilize learner-verification data to revise the materials in question to better meet the needs of learners throughout the state. Such text revision should be interpreted as including specific revision of the materials themselves, revision of the teachers' materials, and revision of the teachers' skill through retraining, it being the intent of the legislature that learner-verification and revision data shall include data gathered directly from learners, may include the results of criterion-referenced and group-normed tests, direct learner comments, or information gathered from written questionnaires from individual or small group interviews, and not preclude the use of secondary data gathered from teachers, supervisors, parents, and all appropriate participants and observers of the teaching-learning process.

POSITION STATEMENT:

The State of Florida Department of Education and the 12 state Instructional Materials Councils participating in the 1976 Adoption recognize that the implementation of the Learner-Verification and Revision Process is not the sole responsibility of the Publishers/Producers of Instructional Materials. The Schools and the Department of Education of Florida must share this responsibility.

The Publishers/Producers must initiate the Learner-Verification and Revision Process. The Schools and the Department of Education of Florida must arrange for the participation of learners and teachers in this process. All concerned must cooperate in arranging the necessary logistics and safeguards to develop a standardized reporting process.

The commitment to the Learner-Verification and Revision Process must not be limited to the instructional materials being submitted in the 1976 Adoption, but must include all that may be submitted in the future - including those presently on state adoption.

PUBLISHER/PRODUCER GUIDELINES FOR REPORTS OF COMPLIANCE WITH LVR PROCESS

There are two approaches for complying with the learner-verification and revision process:

1. To provide proof of the use of the learner-verification and revision process during prepublication development and postpublication revision of the product being bid (Proof-Approach Compliance).

2. To present a plan to systematically gather and utilize learner-verification data to revise the product being bid (Plan-Approach Compliance).

Suggested guidelines for filing written reports for the two approaches follow:

Proof-Approach Compliance

1. State in the heading of the report the compliance approach being used.

2. Give the name of the product being bid. (If the product is a multiple item submission such as a series, program, etc., also give the name of each component being bid.)

3. Describe the instructional design of the product and give the rationale for the design.

4. Describe the intended learner outcomes when the product is used properly.

5. Describe the target population of learners for which the product is intended.

6. Describe teacher preparation needed if the product is to be used properly.

7. Describe the techniques used for gathering learner-based feedback about the product.

8. Describe the learners participating in the learner-based feedback activities.

9. Give an analysis of the findings from the learner-based feedback that indicated product improvement needs.

10. Give the specific improvements made that resulted from the learner-based feedback. (The information regarding improvements made should not be limited to learner-used items, but should also include assistance and directions for teachers.)

11. Give the name, position, company, address, and telephone number of the person filing the report.

Plan-Approach Compliance

1. State in the heading of the report the compliance approach being used.
2. Give the name of the product being bid. (If the product is a multiple item submission such as a series, program, etc., also give the name of each component being bid.)
3. Describe the instructional design of the product and give the rationale for the design.
4. Describe the intended learner outcomes when the product is used properly.
5. Describe the target population of learners for which the product is intended.
6. Describe teacher preparations needed if the product is to be used properly.
7. Describe the techniques that will be used to gather learner-based feedback about the product.
8. Describe the learners who will participate in the learner-based feedback activities.
9. Give the name, position, company, address, and telephone number of the person filing the report.
10. Any publisher using the plan-approach must use the proof-approach when resubmitting these or revised instructional materials.

ATTACHMENT #3

Texas Education Agency

201 East Eleventh Street
Austin, Texas
78701

- STATE BOARD OF EDUCATION
- STATE COMMISSIONER OF EDUCATION
- STATE DEPARTMENT OF EDUCATION

April 11, 1975

Mr. Ken Baranski
The Educational Products
Information Exchange Institute
463 West Street
New York, N.Y. 10014

Dear Ken and Ken,

This is in response to draft 5 of LVR guidelines. Unfortunately I have not had a lot of time lately to attend to this. I did however, ask a few other consultants to read these and give me their thoughts. In the midst of a letter to you I received your phone call and was pleased to have a few more days to read the document again and await any further response from Texas Education Agency people. However, I received no other input.

I did not have many comments to make this time, probably because, first, I have reacted just to the document and not the philosophies, disagreements, and other environmental factors surrounding LVR, and second, because I think the document is much better than previously.

I still think the educational consumer must be responsible for clarifying the criteria of LVR and there is still going to be much confusion about what LVR means. But this document should help further the concept, put it in perspective, and promote a better foundation for understanding.

I expect some forthcoming proclamations for Texas textbook adoptions will ask for evidence of learner based feedback with the materials. Over a period of time we will likely develop more precise criteria for evidence - in conjunction with publishers.

I feel these guidelines are a good start and over a period of years of revision we in education, both seller and consumer, will come to understand LVR.

You must regard my comments and support regarding these guidelines as representative of my opinion, not the Texas Education Agency, even though I received no negative comments on the document either from Mr. Lipscomb nor Dorothy Davidson.

Sincerely yours,

Gary Haseloff

Gary Haseloff, Chief Consultant
Division of Instructional Resources

GH:dlr

ATTACHMENT #4

empc
EDUCATIONAL MEDIA PRODUCERS COUNCIL
3150 SPRING STREET
FAIRFAX, VIRGINIA 22030
(703) 273-7200

1975 MAY -2 AM 11:27

EMPC BOARD OF DIRECTORS
Chairman: EDWARD J. MEELL
McGraw-Hill Films
New York, New York
Vice Chairman: SHELTON STERN
Doubleday Multimedia
Santa Ana, California
IVAN BENDER
EBEC
Chicago, Illinois
SELMA BRODY
Miller-Brody Productions, Inc.
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DAVID ENGLER
General Educational Media
Great Neck, New York
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Guidance Associates
New York, New York
JOHN H. HUMPHREY
Schloat Productions
Terrytown, New York
SUZANNE T. ISAACS
Society for Visual Education
Chicago, Illinois
HAL KOPEL
Coronet Instructional Media
Chicago, Illinois
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Market Data Retrieval
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Changing Times Education Service
Washington, D. C.

REGIONAL COORDINATORS
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MIDWEST REGION
HAL KOPEL
Coronet Instructional Media
Chicago, Illinois
WESTERN REGION
ARTHUR B. REYNOLDS
Walt Disney Educational Media
Glendale, California

April 30, 1975

Mr. Kenneth Komoski
Executive Director
The Educational Products
Information Exchange Institute
463 West Street
New York, New York 10014

Dear Ken:

At a meeting of the Board of Directors of EMPC on April 14, 1975, the Fifth Draft of EPIE's guidelines for "learner verification and revision" was reviewed and discussed. The representatives of EMPC who sat as unofficial observers/participants during the Strand I, Strand II, and Plenary Sessions expressed their views to the Board through Suzanne T. Isaacs, a Director of EMPC and Chairwoman of EMPC's Committee on Media Evaluation.

The Board decided that option Three (3) in your March 21 memo best convey's EMPC's position on these guidelines. That is: "we are totally dissatisfied with Draft #5 of the 'LVR Guidelines' and wish that our dissatisfaction, as expressed by the points outlined below, be appended to the guidelines when they are distributed to all the interested parties."

The shortness of time between the submission of Draft #5 and the need to render a decision does not permit a full explanation of our reasons. This fuller explanation will be forthcoming. In the meantime, EMPC wishes to make the following points:

1. EMPC supports the use of appropriate evaluation techniques to determine the effectiveness of instructional materials. However, there are a number of formative and summative evaluation methods currently available. EMPC feels it would be premature to identify, formalize and support something called "the LVR process" to the exclusion of all other evaluation methods. We feel this way for several reasons:

A. There is a serious question about whether we can generalize about a positive relationship between formative evaluation and product improvement. Neither the "LVR process" nor any form of evaluation has demonstrated this.

B. No single evaluation process can guarantee learning in all learning environments.

C. EMPC would mislead educators and its own members by even hinting that one system or process of evaluating instructional materials is superior to any other. Adoption of this position could lead to the very errors in selection of instructional materials we all are trying to avoid.

D. The interests of learners, educators, researchers and publishers are best served by using divergent modes of evaluation.

E. Before adopting or supporting any process such as "LVR", it is necessary to show that it works; that it demonstrably improves instructional materials. Until this is done, we need to continue using the formative and summative evaluation processes which are already in existence and which are continually being improved by educational researchers.

F. The term, "learner verification and revision", really clouds the issue that what we are talking about is formative evaluation with some summative evaluation. EMPC feels it is necessary to work on improving formative and summative evaluation rather than creating a new term.

G. There is no hint in Draft #5 that the ultimate decision to purchase and use instructional materials rests with the professional educator and not with the publisher telling the professional educator what to think.

2. Even as formative and summative evaluation methods are being employed and improved by researchers and publishers, instructional materials are already subjected to possibly the most vigorous forms of testing. Namely, (a) "previewing" and "on-approval purchasing", and (b) actual classroom use. In the former case, educators may take any materials available into their classrooms and determine if they work with their

student population. The educators do not have to rely on the word of the publisher about how well the materials worked with some remote student group. In the latter case, an even more stringent process is used. Once in the classroom, the materials one used by professional educators with large numbers of students in the actual environment for which the materials were intended. They are re-used, re-ordered or discarded on the basis of the results achieved. Since the environment changes from student to student, class to class and school to school, this is the most empirical process possible and has provided the American schools with the widest variety and choice of instructional materials in the world.

3. Unless and until the "LVR process" described in EPIE's Draft #5 is itself verified, EMPC is concerned that it can be misleading and damaging at the state and local level. The member companies of EMPC recognize that educators require as much flexibility in evaluation of materials as producers need in creation of these materials. The introduction of "learner verification laws" does nothing to change the fact that educators must always be responsible for evaluation of materials which satisfy requirements of their own unique teaching situations. The EMPC calls for a re-evaluation of the existing legislation in California and Florida and urges any state and local system now contemplating "learner verification laws" or policies to seriously examine the experience in California and Florida before adoption of such laws and policies. Laws should be the last in a long series of steps taken to improve evaluation knowledge and techniques. EMPC commits itself to assisting their colleagues in this process.

4. Finally, the EMPC Board of Directors feels that the guidelines do not fairly or thoroughly reflect the serious doubts raised by Task Force participants about "the LVR process."

Even though EMPC cannot accept Draft #5, we believe our goals and yours are the same -- better instructional materials for learners and educators. We both need to continue to work on this matter with these goals in mind. Thank you for asking for our reactions and permitting us to sit as unofficial observers/participants on your Task Force.

Sincerely,

Daphne

Daphne Philos
Executive Director

DP/n

DEPARTMENT OF HEALTH, EDUCATION, AND WELFARE

NATIONAL INSTITUTE OF EDUCATION

WASHINGTON, D.C. 20208

ATTACHMENT #5

1975 MAR 22 0:1975 1

To : Kenneth Komoski

From : Susan S. Klein SSK.
School Practice and Service Division
Office of Dissemination and Resources

(NIE Representative to the National Task Force on Learner Verification and Revision)

Subject: Statement of Reservations on Draft #5--3/21/75 of the LVR Guidelines

The comments that follow reflect my views and the views of a few other NIE staff members who took the opportunity to comment. (Draft #5 of the LVR Guideline was circulated to all NIE Task Force Leaders so that interested persons in the task force could contribute to this NIE response.)

We were generally satisfied with the introduction, orientation, and appendices but felt that the actual "Guidelines for Reporting and Assessing LVR Activities" need some major immediate revisions prior to more extensive exposure and that criteria for adequate or minimal adherence to the guidelines need to be suggested and explained. Thus, we checked response choice "b" and are expressing our praise and reservations.

PRAISE

We think that EPIE has been quite responsive in incorporating the ideas of the diverse constituent groups which it invited to participate in the National LVR Task Force. Draft #5 also made progress in putting the LVR activity in perspective regarding major purposes (continued product improvement instead of product quality assessment) and complementary product improvement activities (rational instructional design, care to promote social fairness, etc.). As R. Chesley from the NIE/ODR staff noted, "The process (LVR) described leaves a great deal to be desired and has a number of loopholes as mentioned (in following discussion). At the same time, it is probably better than not imposing any check on the material quality."

RESERVATIONS

Orientation Toward a Definition of the LVR Process

1. Perhaps "publishers" should be defined broadly or used along with other terms such as "producers" or "developers." It is likely that many instructional materials developers or producers who do not consider themselves publishers would also find it beneficial to use LVR Guidelines.

2. Although progress has been made, additional emphasis can be placed on putting LVR in perspective relating to product purposes. (p. 1) It should be noted that (1) LVR does not guarantee that products will be effective with learners, but is apt to increase the potential for this effectiveness by identifying some product deficiencies and (2) LVR does not generally address or claim to improve other dimensions of product quality such as cost effectiveness or social fairness (which may not be related to learner effects).

3. We think that publishers should make assurances and claims about the quality and general predictive features and effects of their products when the products are used as specified. This consumer information is needed and desired. We agree that LVR activities and information won't generally address itself to this issue. (p. 2)

4. What might happen if the publisher states that the LVR process does not reasonably apply to the products, but the potential purchaser thinks otherwise? (p. 4)

5. We agree that it is most likely that a producer will conduct LVR activities, but feel that evaluation data generated by users or external evaluator sources should also be used if available. These additional sources may be especially important in postpublication or other revisions performed by the producers. It is also possible that users could revise or adapt the materials if they receive the appropriate legal permissions. (You may have said some of this on p. 5 and 6, but some of your statements appear contradictory.)

6. If educators or others are to assess LVR reports common minimal criteria should be suggested. (p. 6)

Guidelines for Reporting and Assessing LVR Activities

It may be most feasible to consider several of your categories as "catalog" information. These categories included: "Descriptive Information on the Product," "Instructional Design," and "Conditions of Use of the Product." This catalog information would be of general interest to future product selectors whether or not they are interested in more detailed information on LVR, product effectiveness, social fairness, practicality, costs, etc. Desired information on categories such as instructional design should be clarified.

The other categories could spell out the details of the LVR process in a supplemental LVR report. These categories and the detail requested seem to address two question areas:

1. Did the producers use an adequate rational procedure to collect feedback from appropriate learners, etc. and then make adequate revisions? This seems like the most important LVR screening question and is addressed by "Intended Learner Outcomes to be Investigated," "Techniques for Gathering Feedback," "Description of Learners Used in LVR Process," "Analysis of Findings and Specific Improvements Made," and "Background and Future of Product."

2. The second question is more of a research question to collect information to identify commonly needed types of revisions. Producers should not be forced to supply this information in detail unless it is needed for "1" above or for definite research projects. There should also be some attempt to deal with multiple feedback and revision cycles. Details on "Analysis of Findings" and "Specific Improvements Made" are likely to be helpful in product improvement research. Would findings such as "side effects" which are not related to intended learner outcomes be investigated? The first sentence under the "Specific Improvements Made" category is misleading. Producers can not always identify exactly where specific changes should be made by analyzing the findings although it does help if fine grain "item analysis" type data is examined rather than class mean gain scores.

cc: C. L. Hutchins
Senta Raizen
Robert Chesley
Art Wise
Peter Briggs

ATTACHMENT #6 .

May 10, 1975

Mr. P. Kenneth Komoski
The Educational Products Information Exchange Institute
463 West Street,
New York 10014, New York

Dear Mr. Komoski,

In response to your request for an evaluation of the Draft #5 of the LVR guidelines, I will answer as an individual. Although I attended the task force in New York - Strand II - in January as a member of the National School Board Association, it is their policy that individual school board members speak as only one representative and not as representing the official position of the NSBA.

I have made my report to the NSBA and have forwarded to them subsequent copies of the drafts as they have been refined.

To choose between a, b, or c as outlined in your letter of March 21, 1975, I would select (b) -

(b) I am not completely satisfied with Draft # 5 of the LVR guidelines and ask that the statement of my reservations which I am attaching, be appended to it when it is distributed to all interested parties.

To summarize my opinion or objections to the LVR process and guidelines, there are four points I would like to make.

1. The concept that instructional materials should be tested on students or learners themselves to see if the students find difficulty using the materials is a good one. Perhaps I was wrong in my earlier assumption the responsible publishers did try out their materials on the user-learner before release to the market place. As with anything, the true test of how well the LVR process is really attempted and how legitimate the results are as outlined or stipulated on the reporting format, depends ultimately upon the integrity of the publisher and the sample group of learners used. In my opinion this process can produce better instructional materials or it can produce a very expensive process for all with increased costs to the consumer and very little tangible improvements that would not already have been forthcoming.

2. There is a dual responsibility between the publisher and "those charged with the responsibility of assessing the LVR reports" (as described on page 9). Here the integrity and the reliability of the publisher is important as well as the purchaser of the materials understanding fully what the LVR process is supposed to evaluate - what it can do and cannot do.

This leads to my main reservation of the LVR process. Unless individuals who use the LVR process, both publisher and purchaser know and understand what the LVR process is supposed to do, its goals, and its limitations, the "purchasers" will tend to expect more out of the process than it is designed to do, or purchasers will assume that certain results will be forthcoming. A quick and superficial mental translation by some individuals of the meaning of "learner verification and revision" can mean that if this process is used and materials are sold with this supporting data, then "students will Learn - it literally verifies that students will learn."

I make the strong suggestion that Appendix - Section C not be the last page of the document, but that it be incorporated at the very beginning in a concise introductory paragraph that defines LVR and includes the clarification and the three points on page 16.

3. The concept that we must not give students or learners any materials that they find difficult to use, or offensive or prejudiced in any way, can lead to mediocrity of educational materials although this risk can be minimized. One problem that can be anticipated as this process grows in acceptance is that there will be an increase in the diversity of pressure groups and special interest groups asking that the materials be LVR'd to reflect their particular area of concern.

The statement on page 6, "If a school expects that a publisher has put materials through the LVR process, that very same school must be ready to make it possible for the publisher to "LVR" that material...." This can work two ways. If a school district wants the LVR process, it is unfair to ask other schools to "carry the burden" (if there is one) of using their classrooms, students, teachers, time, etc. in this testing process. Also if one school district wants the LVR process to see how effective the materials are, the resulting data might be more meaningful if tried on their particular type of student body, i.e., materials LVR'd on a metropolitan urban classroom might have different results from a rural midwestern student population. Different sections of the country or different student body compositions might require more than one LVR process to satisfy that area. This goes back to the basic question of the size of the sample and the type of student/learners tested.

Each year the school district I represent purchases thousands of items from text books to lab equipment to counting sticks. Where is the line drawn between "instructional material" and a supply item. Some distinctions are easy to make, but I suggest that on other items there could be a real question - is this an instructional material item or a supply item.

The students are the ultimate consumer of our entire educational process and the materials and teaching staffs are provided to bring about the greatest growth possible in skills and knowledge. These "learners" should have the best materials and equipment we can devise and design and place in their hands at costs that are as reasonable as we can make them. Therefore, if this process can enhance this goal, then it should become one part of the process of selecting and evaluating instructional materials used in our classrooms. But, speaking as one school board member upon whom the ultimate responsibility falls to find the funds to balance all these needs, the add-on costs of the LVR process must indeed prove to be worth the dollars invested by the publishers and ultimately paid for by school districts in the purchase price of the materials.

Sincerely,

Marilyn Langdon

Marilyn Langdon
School Board Member
Racine Unified School District # 1
Racine, Wisconsin

Home address: 1032 North Osborne Blvd.
Racine, Wisconsin 53405

ATTACHMENT #7

Association of American Publishers, Inc.

Andrew H. Neilly, Jr. Chairman
Townsend Hoopes President
Austin J. McCaffrey Vice President

One Park Avenue
New York, N.Y. 10016
Telephone 212-689-8920
Cable-BOOKASSOC NEWYORK

May 1, 1975

Mr. P. Kenneth Komoski
The Educational Products Information
Exchange Institute
463 West Street
New York, New York 10014

Dear Ken:

Thank you for sending the fifth draft of the Guidelines developed by the Task Force. The Research Committee of the AAP continues to seek opportunities to work within the publishing industry and the education profession to develop greater understanding and steps which can be taken to improve the quality of instructional materials.

In recent months, we have had the opportunity to meet in review sessions with appropriate representatives of the California Textbook Commission, California State Board of Education, members and representatives of the California State Department of Education. Members of the Committee have participated in both trade association workshops and in the annual meeting of the Association for Supervision and Curriculum Development. This continuing activity is consistent with the wish of AAP to "continue to be responsive to various requests from adoption units and independent agencies who wish to meet with representatives of the industry," as indicated in Dr. McCaffrey's letter to you on September 24, 1974. Consistent with that letter and the original position of the AAP School Division Executive Committee, we must respond to your letter of March 21, 1975 by declining to indicate any one of your three options outlined. Rather as we stated in our September 24 letter, we feel we should "maintain AAP's role as an independent industry-wide association free to work with national, state and local agencies on validation and learner verification as each occasion requires." There are certain reservations that each member has as to both the content and the concept of LVR as expressed by draft five. I am sure that should they feel that clarification of their individual feelings are important in improving education, they will individually communicate these feelings to you.

more

DIRECTORS: Andrew H. Neilly, Jr., Chairman *John Wiley & Sons, Inc.* Joan D. Manley, Vice Chairman *Time-Life Books* Harold T. Miller, Secretary *Houghton Mifflin Company* Seymour Turk, Treasurer *Simon & Schuster, Inc.* Leo M. Albert *Prentice-Hall, Inc.* John Backe *CBS Publishing Group* Robert F. Baker *Ginn and Company* S. Arthur Dembner *Newsweek Books* Oscar Dystel *Bantam Books, Inc.* Francis S. Fox *D.C. Heath and Co.* Alexander C. Hoffman *Doubleday and Company* Donald W. Jones *Addison-Wesley Publishing Co., Inc.* Chester Kerr *Yale University Press* Winthrop Knowlton *Harper & Row, Publishers* Morton L. Levin *The Viking Press, Inc.* Werner Mark Linz *The Seabury Press Inc.* Bart Lippincott *J.B. Lippincott Company* Thomas J. McCormack *St. Martin's Press, Inc.* Helen Meyer *Dell Publishing Company* Darrel E. Peterson *Scott, Foresman & Company* Donald Prince *Rand McNally & Company* Anthony M. Schulte *Alfred A. Knopf, Inc.* Craig T. Senft *Litton Educational Publishing, Inc.*

Finally, as our industry position paper stated, we continue to feel that learner verification and revision must be considered only within the context of total materials development and selection process. That position paper starts by recalling that American publishers have always assumed responsibility for developing effective learning materials and concludes with the important observation that, "The ultimate guarantee that publishers will continue to produce higher quality materials is the fact that educational publishing is highly competitive. Excellence is required in product development in order to produce materials that will be accepted by professionally trained educators and used successfully by students."

Sincerely,

James R. Squire
Chairman
School Division

JRS:sf

cc: Research Committee

HOLT, RINEHART
AND WINSTON
CBS Inc., 383 Madison Avenue
New York, New York 10017
(212) 688-9100

ATTACHMENT #8

June 6, 1975

Mr. Kenneth Komoski
Executive Director
The Educational Products
Information Exchange Institute
463 West Street
New York, New York 10014

Dear Ken:

In response to your invitation to comment on your LVR guideline statement, I elect to choose option (c): I am totally dissatisfied with draft #5 of the LVR guidelines and wish that my dissatisfaction, as I have expressed it in the attached statement, be appended to it when it is distributed to all interested parties.

During the past two years, Holt has commited itself to an investment of time and resources to develop, evaluate, and implement a workable model for the collection of data from the people using its programs, both learners and teachers. In the 1974-75 year, our data collection efforts have brought us into contact with over 100 schools throughout the country. Our concern with the EPIE guidelines is that of a committed participant in the learner-based research and evaluation process.

Somehow or another what promised to be a contribution to the improvement of education has become so confused that the impact of the "guidelines" will be more negative than positive . . . and that's a shame. Also it is a tragedy because it didn't need to turn out that way. Let's start with some fundamental elements:

1. Improvement of education is the overall goal.

2. The quality of instructional materials, as well as many other variables, i.e., teachers, facilities, support of parents contribute to achieving the overall goal.

3. Producers/developers/publishers of materials have a responsibility to produce better materials to help achieve the goal.

The issue then comes to, "How do publishers achieve this objective?" The "guidelines" seem to offer an answer, not to that question, but rather,"How should publishers responsibly develop better materials?" Oh, I recognize that the statement warns the reader several times that "LVR" is not a panacea but that's in one breath, while everything else says, "This is the way." And to make certain that no one misses the point the guidelines clearly suggest that if a publisher fails to follow the way, then those materials are unworthy of purchase. (Oddly, EPIE warns the reader to watch out for some publishers who do provide data in the suggested format for they may be "unscrupulous" or using "trickery".)

The commitment to a somewhat disguised, "the way"; the continued commitment to an incomprehensible label "LVR", seeming to prove once again that created terms that don't improve communication deserve to be discarded; the exploitation of human behavior to promote undue suspicion toward profit making companies (some of our stockholders would be amused with such a label); the total absence of responsible indication to the reader that if "the way" is implemented it will result in significantly higher costs of materials and in a reduction of the number of programs published (thus making development of materials possible for the major publishers and in turn eliminating competition) - all of this adds up to perhaps, a well-intentioned document that builds expectations which cannot be readily realized.

The question which comes to mind is, who has implemented, evaluated, and "verified" EPIE's LVR process? We know that our own model requires ongoing assessment and adjustment; how workable is the EPIE model? I suspect that EPIE, like the Publishing Industry, can make no guarantees. The state of the art of evaluation and testing limits us all. The EPIE guidelines assume the availability of instruments for collecting data from learners. Some data can be collected informally, but as yet, outside of achievement or criterion referenced testing, not very precisely or professionally. The simplest method, observation, is prohibitive in cost unless it is limited to a few sets of students within a limited geographical area. While attitudinal measures are being developed, their scope is often limited and many are still experimental.

Now, let me say that concern about development and improvement of instructional materials is a valid one. Materials, like almost every other thing in life, can and should be better. Publishers have the central responsibility for building better materials. Such a responsibility includes the use of research at many levels - curriculum content, organization, manageability, and motivation. Inherent in the publishing process is the marshalling of resources to assure successful use. As EPIE rightfully indicates, children must be involved in this process for they are in most cases the final users. I say in "most cases" for there are many elements of an instructional material program which are directed towards the teacher who in turn is in fact the "delivery system". Thus the success of a total instructional system is tied to materials/child; teacher/child, and/or teacher/materials/child relationships. Research designs weighted exclusively to single relationships fail to provide adequate information to construct, or revise materials.

Recognizing the state of the art of research and measurement generally and research on instructional materials specifically it seems to me that review committees would be better advised to begin with more reasonable questions than the guidelines propose. I say "reasonable" for I don't think anyone can reasonably respond to the present format without generating disappointment and frustration.

Let me suggest two core questions:

1. Publisher, how did you involve children and teachers in the development of this product? Explain . . .

2. Publisher, now that the product is published, what is your commitment to involve children and teachers in aiding you to improve the product? Explain . . .

School people have every right to expect better answers to these questions each year. A satisfactory answer today, will be less satisfactory a year from now, and still less and less two or more years hence. But such questions would represent a solid beginning to the original concern of EPIE, and all of us who believe that instructional materials are important but can be better. Yet at the same time we must maturely recognize the complexity of the problem. When President Lincoln, as reported in the EPIE statement, told his tailor to make his trousers long enough to reach the ground, they at least could agree on the purpose of trousers and where the ground was. Sadly, today, often times neither the school buyer, nor the publisher are at the equivalent level of understanding. Perhaps even less so, if they try to use the EPIE guidelines.

Thank you for the opportunity to participate in some of the discussion on the issue. I assure you that Holt and most, if not all, other publishers are dedicated to the continued improvement of education through the development of increasingly better instructional materials. I believe EPIE shares that hope and promise. Yet somehow, you have over engineered the good idea.

Cordially,

Thomas J. Murphy
Vice President and General Manager
School Department

ATTACHMENT #9

Education Commission of the States
300 LINCOLN TOWER • 1860 LINCOLN STREET
DENVER, COLORADO 80203 • (303) 893-5200

1975 [illegible] 10:21

April 4, 1975

Personal statement by Chris Pipho to be attached to the Learner Verification and Revision guidelines.

The notion that learners and teachers should have some involvement in the preparation, revision and updating of instructional materials is a good idea. I personally feel that reputable publishers and writers would not quarrel with this concept and in many ways are already carrying out the process.

My personal opinion [because the Education Commission of the States has not discussed or passed a resolution on LVR] is that the idea, while noble, does not easily lend itself to legislative mandate. In order to properly carry out the concept, legislation would have to require that groups of people not usually bound together in the same governance-structured matrix, work together and be supervised by some state regulatory agency, i.e.: asking that publishers involve students and teachers without making provisions for local and state boards to preempt teacher and student time would be asking students and teachers to support the publishing industry. On the other hand, making publishers pay for the student and teacher time in an era of tight collective bargaining contracts could drive some publishers out of business.

While I realize none of these fears can be substantially drawn from this document, the implementation and supervision of the process would eventually, in my opinion, call for increasingly more definitive legislation. The end results I think would be of questionable cost-effective value.

Up until now, a majority of the states have expressed no interest in learner verification and revision. The inference implied in the introductory section of the guidelines is that learner verification and revision is a coming trend. I do not agree with this contention.

Respectfully submitted,

Chris Pipho
Associate Director
Research and Information Services
Education Commission of the States
Denver, Colorado

ATTACHMENT #10

Association for Supervision
and Curriculum Development

April 7, 1975

Dr. Kenneth Baranski
The Educational Products Information
Exchange Institute
463 West Street
New York, NY 10014

Dear Ken:

Thank you for the patience and extension of time. As per our April 7th telephone conversation. I have listed my cautions below:

(1) that readers of the LVR guidelines note the temporary nature of the document as expressed in the task force desire to observe pilot situations;

(2) that the pilot situations become a basis for possible review and update;

(3) that readers are informed of the larger issues of instructional materials selection of which the LVR system is a part;

(4) that readers are informed that predictive validity is not the intent of LVR;

(5) that task force persons be reminded of the spirit of cooperation and openness rather than an unsung distrust; and,

(6) that the whole project continue to move slowly, deliberately, cautiously.

Again, my thanks go out and my hat is off to you and Ken Komoski for your efforts to incorporate some of the above cautions into the introductory letter to be attached to the document.

The document with a few editorial comments is attached for your consideration. Also, I have made the appropriate checks. It must be added that my

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Washington, D.C. 20006 • (202) 467-6480

GORDON CAWELTI, Executive Director

reserved approval reflects a personal view - not the view of the ASCD governance system.

Again, thanks - good luck. Call on me as you need.

Yours sincerely,

Chuck

Charles A. Speiker
Associate Director

CAS/mkt

Attachment

CC: Dr. Kenneth Komoski

ATTACHMENT #11

THE SCHOOL BOARD OF POLK COUNTY, FLORIDA

TELEPHONES
813-533-0931
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BARTOW, FLORIDA 33830

P.O. BOX 391

HOMER K. ADDAIR
SUPERINTENDENT OF SCHOOLS

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DISTRICT 4

TED AGGELIS
DISTRICT 5

April 8, 1975

Mr. P. Kenneth Komoski
The Educational Products
Information Exchange Institute
463 West Street
New York, New York 10014

Dear Ken:

I apologize for failing to meet your deadline. My feelings on the fifth draft of your LVR report are similar to my previous comments on the subject and I see no point in re-running those thoughts.

With specific regard to the report itself, I believe it to be a lucid, well written document which more than adequately expresses your objectives for the program, but since I don't share your premise I can't bring myself to endorse the final work.

I would be pleased to contribute anything I have to offer as you continue your efforts to refine this draft. I know I appear recalcitrant and accept the fact that I am. I hope, nevertheless, that our difference never becomes one of more significance than our difference on this one issue.

Sincerely,

Edwin A. Thompson
School Board Member, District #3

EAT:ry